



Intelligent Advisory Portfolios

# PRIME PORTFOLIO

## ► What is Prime Portfolio?

Prime Portfolio is a concentrated portfolio that blends tactical bets with long term winners and provides investor advantage with a mix of long term compounders as well as special company/sectoral picks.

### Key Features of Prime Portfolio



Blend of long term winners (70-75%)  
with Tactical bets (25-30%)



Well diversified portfolio comprising  
of large, mid and small cap companies

## ► Investment Universe, Process & Strategy

Stock selection procedure involving 2 strategies:

**Long Term Winners (70-75%):** Stocks relevant from a 12-18 month perspective – these are companies which have a proven track record of profits over 3-5 years, meaningful growth triggers & beaten down stocks with favourable risk reward

**Tactical bets (25-30%):** Stocks that are relevant from 3-6 months horizon. Major buy triggers include a change in government policy, industry consolidation and company specific opportunities

# USP



Combination of Tactical  
bets along with Long  
term winners



Generating growth over long term  
as well as take advantage of  
special company / sector situations



Concentrated  
portfolio  
of 15-20 stocks

## ► Rebalancing Strategy

- Company or Industry fundamentals have started to change
- Too much negativity around a company or sector
- An extreme macroeconomic / market situation
- Stocks that have better growth prospects or better capital allocation policies

## ► For Whom?

Investors with moderate risk profile having an investment horizon of a minimum 3-5 years

## ► Basic Details

**NO. OF STOCKS**  
15-20

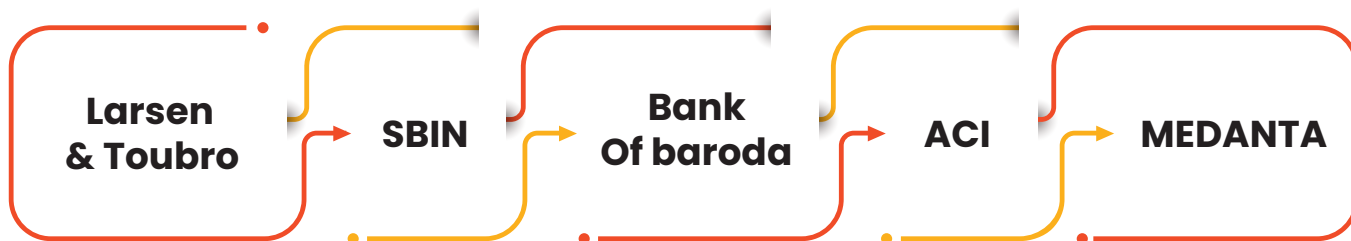
**BENCHMARK**  
Nifty200

**RISK**  
Moderate

**TIME FRAME**  
3-5 Years

**RIA**  
Vivekam Financial Services Pvt. Ltd.

## Top Stock Holding



The securities quoted are for illustration only and are not recommendatory

Registration granted by SEBI, membership of BASL and certification from NISM in no way guarantee performance of the intermediary or provide any assurance of returns to investors

## LUMP SUM



**Option:** One Time Investment



**Subscription mode:** Upfront Subscription



**Withdrawal:** Full or Partial

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**Vivekam Financial Services Private Limited.**

**Address:** Plot 57, Road 71, Jubilee Hills, Hyderabad, Telangana, India - 500 033. Phone: 2354 9940

**Registration No.:** INA200000316 Valid till cancellation by SEBI.

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